

The best business phone system for the financial services industry.



Financial advisors, planners, and associates need to be responsive and connected to keep their clients happy. Whether discussing a financial product with existing or new customers, Ooma Office helps them manage their calls better while working from anywhere and reducing their monthly costs.

Ooma Office, the #1 rated business phone service, provides the best value for financial services organizations.



Winner
6 Years Running!

✓ **24 x 7 Virtual Receptionist directs calls, provides helpful information.**

If you are unable to answer the phone when meeting with clients, or you're busy setting up new accounts, or it's after business hours, Ooma's virtual receptionist greets callers and provides information that answers common questions. Your clients can reach the right team member in one or multiple offices. You can build menu options such as: Press 1 to reach the directory and specific advisors, Press 2 to make a payment, Press 3 for office or branch hours of operation. It's flexible and easy to update to fit your needs.

✓ **Never miss a business call when out of the office.**

Ooma's mobile app enables you to have extension dialing to it so you can use your business number anywhere. Incoming calls are easily identifiable so you know which calls are personal and which are business. You can flip an active call from your desk phone to your mobile phone when you need to depart while continuing a conversation.

✓ **Simultaneously ring numerous team members.**

With Ooma Office, you can create customized ring groups that simultaneously ring advisors or associates whether they are in your office or out in the field.

✓ **Free toll-free and local numbers.**

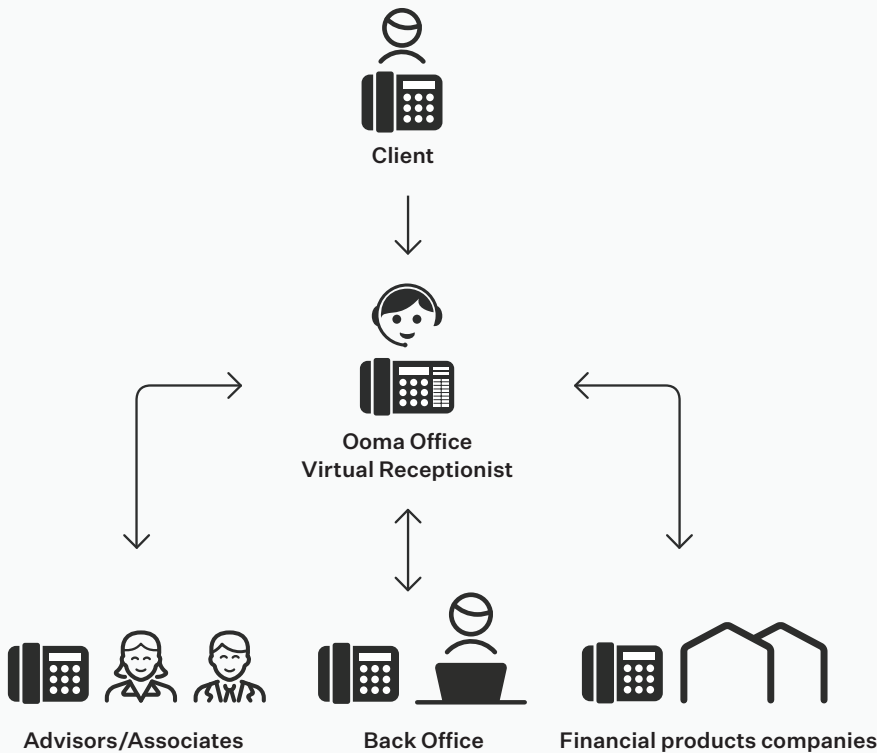
Eliminate long distance charges on calls between locations. Enjoy free unlimited calling to Canada, Mexico and Puerto Rico, with low international calling rates to other countries. Free fax numbers enable you to fax multiple documents simultaneously.

Oswald Financial

“ We switched from Spectrum. It's been the best decision, EVER! We seriously can't say enough about Ooma Office. We are a financial company that strives to provide the best customer service. Hands down Ooma Office has played a huge part in making that possible! ”

– Heidi W.

Whether you have one or numerous locations, Ooma Office is easy to install without disruption. You can port your previous phone number and easily manage and update the system remotely within the Web admin portal.



Financial services advisors, agents, and team members stay connected to customers.

When clients call to schedule an appointment or inquire about financial services and investment options, their calls are answered immediately. It takes just seconds to park or transfer a call to the right staff members so your customers have a great service experience, which builds loyalty and referrals. You eliminate big bills with surprise add-ons or complicated, inflexible systems that don't serve you and your clients' needs. And there's highly rated 24x7 support if you ever need it.

With Ooma Office, you get all the business phone features that are perfect for staying connected and responsive to meet the demands of the insurance business. You get clear, flexible, reliable communications that save money for one or multiple office locations.

35 advanced features at a low monthly rate of \$19.95 per user. All-inclusive pricing. No nickel and diming or surprise add-ons or setup fees. We are so confident you'll love the quality and value of Ooma Office, there are no contracts!

Key features include:

- Auto attendant/virtual receptionist
- Advanced call routing
- Call forwarding
- Call logs
- Call park
- Conferencing
- Dial by extension
- Dial by name
- Do not disturb
- Enhanced 911 service
- Faxing
- Intercom one-to-one
- Music on hold
- On-phone presence monitoring (BLF)
- Paging groups
- Personal automated attendant
- Ring (hunt) groups
- Time-based call routing
- Toll-free numbers
- Voicemail to email messaging



Ooma Office Pro provides additional features for \$5 a month more per user:

- Call Recording
- Enhanced call blocking
- Higher usage limits for extension monitoring, call park, audio conference room participants
- Overhead Paging
- Voicemail transcription

Unlike other providers, Ooma pre-provisions each phone so when you receive them, all you need to do is plug them in, log in, and you are up and running.

Call 877-959-6662 to learn more and get started today.

